COVID-19 Current & Future Impacts
Feedback from Jun/Jul 2020
Membership Survey

Connecting and empowering the world of infrastructure and project financing.
Introduction
As part of our CV19 Hub, we have been circulating surveys at the various stages of the pandemic to gather your feedback on the impact of COVID-19 on our industry.

We then use the results to report back to the industry and to determine how we can best shape our services to respond to your concerns and needs during this time.

This report is formed from the results of the second survey, which looked to determine what you see as the main priorities as we move to recovery.

COVID-19 Current & Future Impacts Survey Results

Who took part?
Responses to this survey represent 32 countries, including: Australia, Belgium, Belarus, Brazil, Canada, Colombia, Cote d'Ivoire, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Kenya, Luxembourg, Malaysia, Nigeria, Oman, Philippines, Poland, Saudi Arabia, Singapore, South Africa, Sweden, Switzerland, The Netherlands, Tunisia, Turkey, United Arab Emirates, UK, US and Zimbabwe.

76% of respondents have at least 10 years industry experience or more.

What are the continued impacts of COVID-19?
Following the same trend as our Apr/May survey, economic recession (60%), followed by reduced demand (29%) and cashflow (26%) were identified as the most concerning aspects of the crisis for organisations / sectors.

Q. How many years experience in industry do you have?

0. Which industry are you in?

0. How many years experience in industry do you have?

Graph showing percentage of responders per industry sector.

Graph showing percentage of responders per experience brackets.

Graph showing percentage of responders per the concerning aspects of the crisis for the organisation / sector.
What are the continued impacts of COVID-19?

When comparing how working remotely has affected day to day business, 37% of respondents feel client meetings have been slightly less productive as has been engaging with their team (39%). 54% have noticed no change in completing bids. 40% of respondents have found online learning slightly more productive in the new environment, as well as attending virtual events (37%).

Looking towards recovery from COVID-19

Looking forward, 47% of respondents predict they will next attend in person client meetings from Jan 2021, also from that time 53% predict they will be able to attend an event with up to 25 people. Almost half of respondents predict they will be able to attend an event with over 100 people. 38% of respondents suggest they might be able to take overseas travel from Jan 2021, while 33% think it will more likely be from Jun 2021.

Q. When do you foresee that you will be taking part in the following business activities?

<table>
<thead>
<tr>
<th>Activity</th>
<th>From Sep 2020</th>
<th>From Jan 2021</th>
<th>From Jun 2021</th>
<th>From 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client meetings</td>
<td>12%</td>
<td>37%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Completing bids</td>
<td>6%</td>
<td>23%</td>
<td>54%</td>
<td>13%</td>
</tr>
<tr>
<td>Engaging with your team</td>
<td>7%</td>
<td>39%</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Online learning / professional development</td>
<td>2%</td>
<td>12%</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Attending industry events</td>
<td>11%</td>
<td>16%</td>
<td>15%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Graph to show percentage of responders per activity/timeline comparison.
As we emerge from the crisis, 95% of respondents agree that economic recovery should be prioritised more urgently. 85% also agree the same for digitalisation. For social infrastructure, 52% believe it should be prioritised more urgently in recovery. There were mixed views on climate change, with the majority of 42% suggesting there should be no change in urgency levels, and 40% believing it should also be addressed more urgently.
Whilst the world is changing rapidly, IPFA remains your go-to platform for connectivity and knowledge sharing. As your home for thought leadership, we will continue to bring our global community together to connect, share and stay up to date as we face challenging times together. IPFA is driven by and for our members, and the surveys provide an invaluable opportunity for us to review and respond to your concerns and needs.

We would like to thank all members who took part for your contribution.

Keep an eye out on our CV19 Hub webpage for updates on our activities.

www.ipfa.org/cv19-hub

Contributing to the CV19 Hub

Do you have materials to share? Through collaboration with our members, whether that is via a webinar, podcast, interview, report, Q&A session, thought leadership piece or a virtual discussion, we can share your industry insights with our global network and continue our engaging discussions online.

If you would like to host, participate, or contribute content for this Hub to share with fellow members, let us know at connect@ipfa.org
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